

IRS TAX TRANSCRIPTS

If an applicant is not eligible to use the IRS Data Retrieval Tool, or is eligible and chooses *not* to use it, then an **IRS Tax Return Transcript** must be requested and submitted to **SWCC Financial Aid Office**.

Due to Department of Education rules, we are not permitted to accept copies of a person's Form 1040, 1040A, or 1040EZ, except in the very rare case that the student or parent can provide proof that obtaining an IRS Tax Return Transcript was not possible. Please contact your financial aid advisor if you believe this is the case and they can assist you in completing the necessary steps.

Also, **if you change your or your parents' tax information after using the IRS Data Retrieval Tool**, then an IRS Tax Return Transcript must be submitted in order to provide **SWCC** with the most accurate data.

If you have changed the tax info to remove Rollover portions of untaxed Pensions or IRA distributions, please contact your financial aid advisor and provide documentation supporting the Rollover status.

Requesting Transcripts

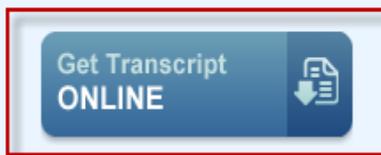
The IRS.gov website has a new service called [Get Transcript](#) that allows tax filers to obtain an immediate PDF download of their prior tax return transcript.

Get Transcript

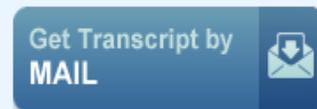


Get a record of your past tax returns, also referred to as transcripts. IRS transcripts are often used to validate income and tax filing status for mortgage applications, student and small business loan applications, and during tax preparation.

You can download and print your transcript immediately, or request the transcript be mailed to your address on record.



- View and print your transcript immediately.
- Choose among [Tax Return](#), [Tax Account](#), [Record of Account](#), or [Wage and Income](#) transcripts or a [Verification of Nonfiling Letter](#).
- Need help? [More information about Get Transcript Online](#).



- Transcripts arrive in 5 to 10 business days.
- Choose from either a [Tax Return](#) or [Tax Account](#).
- Transcript by Mail is available [en Español](#).

1. Click "Sign Up" to register on the

Sign In

User ID

Mask User ID

[Forgot User ID](#)

SIGN IN >

Sign Up

You must sign up to create or reactivate your account.

CREATE AN ACCOUNT >

site.

2. Enter your name and email, then click the button to retrieve a confirmation code

Sign Up: Step 1 of 6

All fields are required.

First Name

Last Name

Email

Confirm Email

Click the "Send Email Confirmation Code" button. A confirmation code will be sent to your email address.

A new page will appear. Make sure you keep this page open in your browser. Then check your email and enter the confirmation code on this same webpage.

Sign Up: Step 2 of 6



Retrieve your confirmation code by viewing your email in another browser window. Do not close this window, or you will have to restart the process.

All fields are required. Do not close or navigate away from this page until your registration is complete. Please click the 'Verify Email Confirmation Code' button at the bottom of the page to continue.

First Name

Last Name

Email

Enter Confirmation Code

[Resend Email Confirmation Code](#)

CANCEL

VERIFY EMAIL CONFIRMATION CODE >

3. You will be prompted to enter your personal information. **Make sure you enter this exactly as it appears on your tax form.** For example this includes the way you entered your address information ("Drive" vs. "Dr.", or "Apt." vs. "#"). If the information doesn't match, you won't be able to access the service.

Sign Up : Step 3 of 6

All fields are required. Your information must match your most recently filed tax return.

Personal Information

First Name

Last Name

Email

Social Security Number (SSN) or Individual Tax ID Number (ITIN)

 — —

Date of Birth

 Month ▼ Day ▼ Year

Filing Status

- I have filed a tax return in the past seven years

- Once you have authenticated, you will be able to download the PDF of your transcript and save it for your records.
- You can email the transcript as an attachment to tdean@swcc.edu.

Please note that if you call the IRS to request a transcript, you will be directed to use the *Get My Transcript* service. However, help agents will be able to assist you if you are experiencing difficulty using the services.

Important items to remember:

- Signatures on transcripts are not required but encouraged.
- Please make a copy for your records prior to sending to **SWCC**.
- If you are unable to use the Get My Transcript services and have to request one over the phone, please note that the IRS will only send the transcript directly to **SWCC** if the Financial Aid fax number is given as the "recipient" fax number (**972-563-7133**).
- If you request a transcript using Form 4506 or 4506-T, Line 5 allows for a "3rd party recipient". If you enter **SWCC's** mailing address here the transcript will be sent directly to **SWCC**.

Southwestern Christian College
Financial Aid Office
PO Box 10
Terrell, TX 75160-9002

- Be sure to request a **Tax Return Transcript** and not a Tax Summary or a *Tax Account Transcript*, which do not contain the comprehensive tax data needed from the filer's original Form 1040, 1040A, or 1040EZ.